

WYLD TECHNOTE 012 : Patron Charge History

6/20/2014

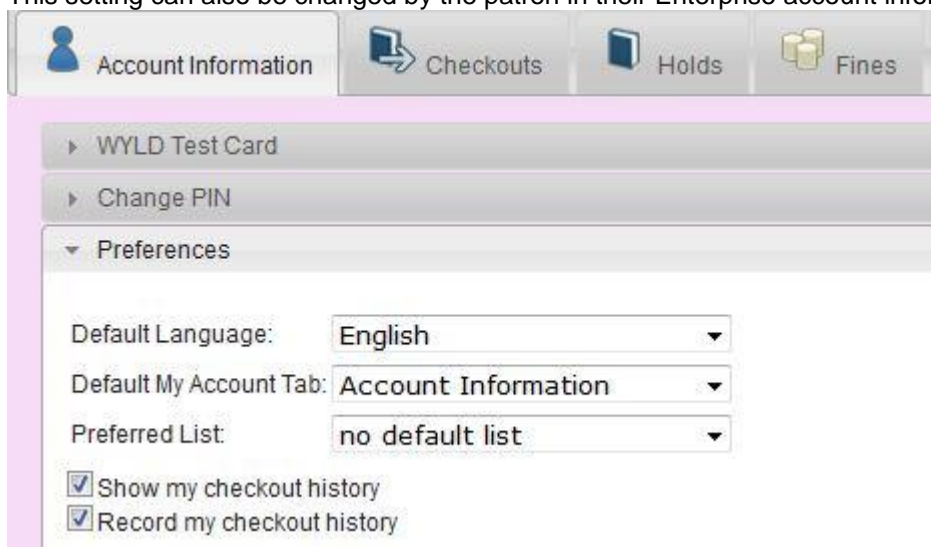
Charge History in WorkFlows

Starting in June of 2014, the **Charge History** feature was made available in Symphony Workflows. This feature tracks all charges to a patron record from the time it is enabled. It is not retroactive and records charges at the time of discharge. The default setting for registering new patrons is to **not** track charge history (NOHISTORY), although this can be changed in the properties for user registration.



The screenshot shows a registration form with three tabs: Behavior, Defaults, and Helpers. The Behavior tab is active. It contains three dropdown menus: Library (set to CAMP), Profile name (set to 17PA), and Charge history rule (set to NOHISTORY).

This setting can also be changed by the patron in their Enterprise account information (preferences tab)

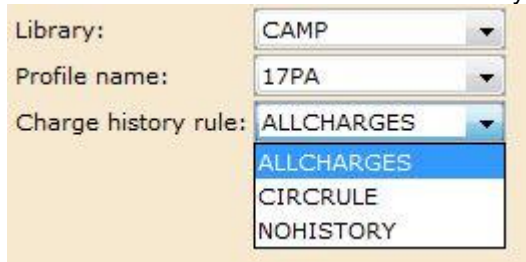


The screenshot shows the Enterprise account information page with four tabs: Account Information, Checkouts, Holds, and Fines. The Account Information tab is active. It contains a list of options: WYLD Test Card, Change PIN, and Preferences. The Preferences section is expanded, showing three dropdown menus: Default Language (set to English), Default My Account Tab (set to Account Information), and Preferred List (set to no default list). Below these are two checkboxes: Show my checkout history (checked) and Record my checkout history (checked).

* Show my checkout history will show charges on the checkout tab in Enterprise

* Record my my checkout history will keep track of charges on the patron record, but will not show them in Enterprise if the 'show charges' box is not also ticked

In workflows there are two choices for the type of charge history to record: ALLCHARGES or CIRCRULE.

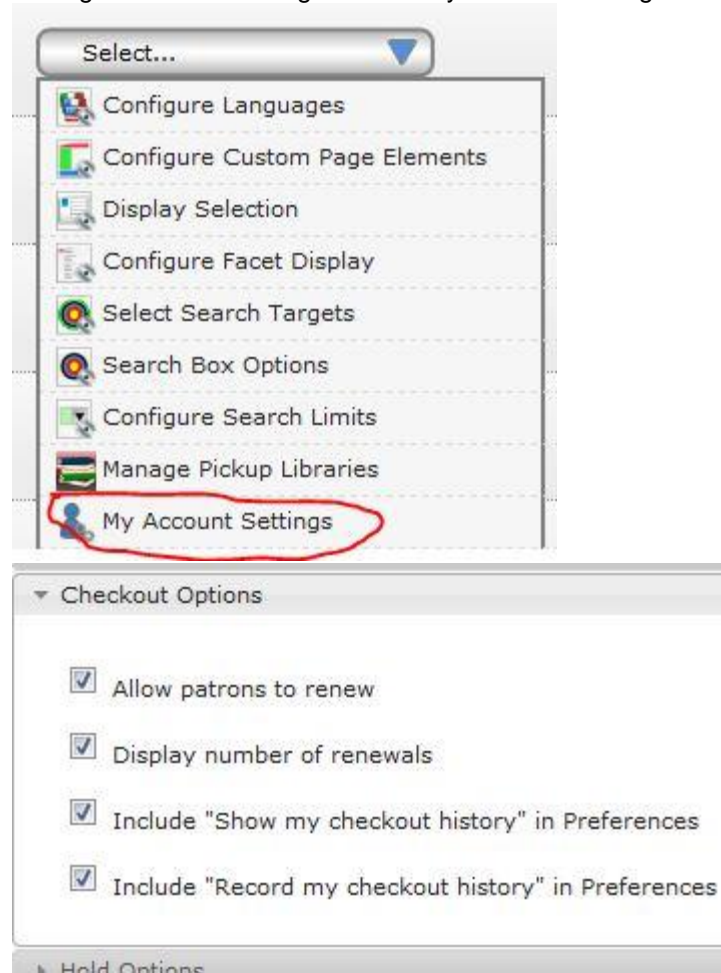


The screenshot shows a dropdown menu for the Charge history rule. The menu is open, showing three options: ALLCHARGES (highlighted in blue), CIRCRULE, and NOHISTORY. The Library and Profile name dropdowns are also visible above it, set to CAMP and 17PA respectively.

The WYLD office selected ALLCHARGES as the type of history to record, so staff should make sure to

select ALLCHARGES when activating this feature on behalf of a patron, * as stated above, the default for registering new patrons is NOHISTORY.

To enable Charge History for patrons in Enterprise a setting must be changed in Enterprise admin. Go to Manage Profiles > Configuration > My Account Settings > Checkout Options



Check both boxes - "Include 'Show my checkout history' in Preferences" and "Include 'Record my checkout history' in preferences".

Removing Charge History

Although patrons can uncheck the box to record their charge history, this does not remove their charge history from the system. To completely remove a charge history, library staff must run the Purge Charge History report in the Circulation group of reports.